



# Leading Well-Being

Module 3: Oasis of Well-Being

WORKBOOK FOR EXECUTIVES, AKA "TRENDSETTERS"



## The journey continues.

In Module 1, we kicked off the “Leading Mental Well-Being” Series with the topic “It Starts with You.” You learned why leaders play such an important role in mental well-being. You had the chance to reflect on your leadership style and how that impacts the mental well-being of you and your employees. We wrapped up with a focus on daily touchpoints.

In Module 2, “Culture First,” we took a deep dive into the role that culture plays in mental well-being at work. Just as you’ve learned with safety, it’s not enough to expect individuals to practice safety on their own. Rather, there needs to be a culture of safety. The same holds true for promoting mental well-being. In this module, we outlined the steps that you can take to begin building a Culture of Mental Well-Being across your organization.

In Module 3, “Oasis of Well-Being,” we’ll drill down more into the team level. You’ll learn about the multiple dimensions of well-being (it’s more than just physical!) and why it’s important to lead your team, and your company, in addressing all of these. You’ll explore the power of leading by example and talking about well-being, as well as ways to create systems that enable people to leverage existing resources.

In Module 4, “Safe Harbor,” we’ll dig into the fundamentals of what all humans universally need: autonomy, a sense of achievement, being connected with others, and a sense of purpose. You’ll learn how you can promote psychological safety and “awaken compassion” within the team and across your organization, creating a framework of emotional safety and belonging for all.

In Module 5, “One Conversation at a Time,” you’ll learn how to tackle the issue of mental well-being on an individual level. You’ll learn about the warning signs of someone in need and how you can quickly and effectively respond.

In Module 6, “Built to Last,” you’ll have the chance to review all of the modules and reflect on actions you’ve taken so far so that you can walk away with a template for catalyzing lasting change across the organization.

With that, let’s get started with Module 3!

## What’s well-being got to do with it?

This activity is designed to help you understand the business case for well-being at work.

**Prompt 1:** Give me any metric that matters to *your* bottom line...

**Jot notes below:**

**Prompt 2:** List the top reasons for well-being at your company. (See if you can come up with at least 3 reasons.)

**Jot notes below:**

**Prompt 3:** Come up with a one-liner that supports your case.

**Jot notes below:**

**Prompt 4:** Make your pitch.

**Jot notes below:**

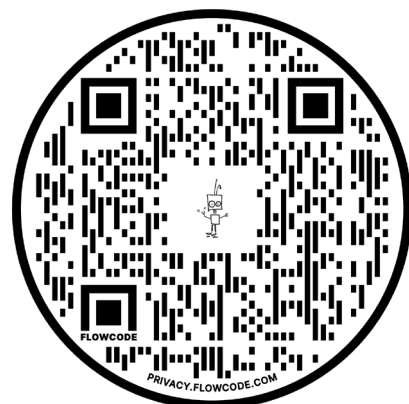
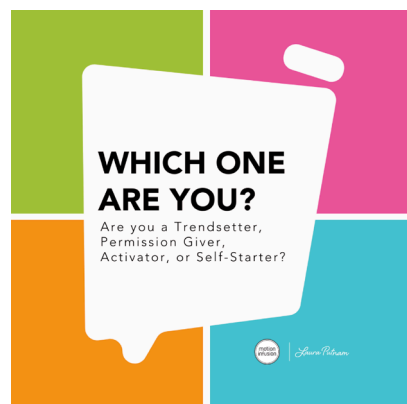
### WRAP UP:

Well-being is often seen as something that we only do outside of work. Yet well-being at work can make all the difference. Very simply, well-being is good for people and good for the bottom line. Seriously, name any metric that matters to the organization, and there’s a business case for well-being.



## What have you got to do with it?

Which one are you? Take the quiz.



Are you modeling (DO) and talking about (SPEAK) your company wellness programs?

Wellness Offering	DO: Am I doing this?	SPEAK: Am I talking about it?

**WRAP UP:**

This activity may be a wake-up call for you! Company wellness programs are only as good as the extent to which people actually use them. If you use them, and if you talk about them, chances are that people you lead will do the same. They're looking to you for inspiration!



## DO: Set a goal.

This exercise is designed to help you set a personal well-being goal.

**DIRECTIONS:**

Take stock of where you are in each of the six dimensions of well-being. On a scale from 1-10 (1 being the worst, 10 being the best), where would you say that you are in each dimension?

Fill in the blanks below:

<input type="text"/>	<b>Physical</b>	<input type="text"/>	<b>Social</b>	<input type="text"/>	<b>Financial</b>
<input type="text"/>	<b>Emotional</b>	<input type="text"/>	<b>Community</b>	<input type="text"/>	<b>Career</b>

**Question 1:** Based on this self-assessment, what's a BIG goal you want to set? (See the next page for ideas.)

Dot notes below:

**Question 2:** What are ways you can leverage the well-being offerings at your company to help you move toward your goal?

Dot notes below:

**WRAP UP:**

The power of commitment can't be overstated. By declaring a personal well-being goal and actively leading by example, you're on the path to leading a healthier, happier life. You're also creating a positive ripple-out effect for your team and for your team and your company.



SAMPLE GOALS



<p><b>PHYSICAL</b></p> <ul style="list-style-type: none"> <li>• Get more physically active.</li> <li>• Get 8 hours of sleep every night.</li> <li>• Eat a healthier diet.</li> </ul>	<p><b>COMMUNITY</b></p> <ul style="list-style-type: none"> <li>• Get more involved with your neighborhood.</li> <li>• Make household more sustainable.</li> <li>• Get actively involved with a nonprofit.</li> </ul>
<p><b>EMOTIONAL</b></p> <ul style="list-style-type: none"> <li>• Manage stress better.</li> <li>• Build a more positive mindset.</li> <li>• Become more resilient.</li> </ul>	<p><b>FINANCIAL</b></p> <ul style="list-style-type: none"> <li>• Get out of debt.</li> <li>• Start automatic payments.</li> <li>• Spend on experiences with loved ones.</li> </ul>
<p><b>SOCIAL</b></p> <ul style="list-style-type: none"> <li>• Spend more time with friends &amp; family.</li> <li>• Spend 6 hours a day with others.</li> <li>• Find a best friend at work.</li> </ul>	<p><b>CAREER</b></p> <ul style="list-style-type: none"> <li>• Work toward a promotion.</li> <li>• Deepen sense of purpose.</li> <li>• Take a course.</li> </ul>

**SPEAK: Write a Jamie Dimon memo.**

This activity is designed to help you communicate about the importance of well-being to the people you serve.

**DIRECTIONS:**

What’s going to be your version of a “Jamie Dimon” memo to your employees? To help you get started, take a look at the memo that Jamie Dimon, CEO of JP Morgan, sent to all of his staff. Then, take a look at a sample “Jamie Dimon” memo, written by another executive who went through a similar program.

**JAMIE DIMON’S MEMO TO STAFF**

Dear colleagues,

This past summer, I let you know that I had been diagnosed with throat cancer. Having concluded my full treatment regimen a few months ago, I wanted to give you an update on my health. This week I had the thorough round of tests and scans that are normally done three months following treatment, including a CAT scan and a PET scan. The good news is that the results came back completely clear, showing no evidence of cancer in my body. While the monitoring will continue for several years, the results are extremely positive and my prognosis remains excellent.

As always, and especially since my diagnosis, I followed the advice I give to others – take care of your health first – nothing is more important. Throughout this journey, I was blessed with the love and support of my family, friends and colleagues, and I received an outpouring of heartfelt warm wishes and messages from thousands of others, which meant so much to me.

I’m very proud to be part of this company and it’s an inspiration to work with such an exceptional group of people.

With deep gratitude and respect.

Jamie Dimon



**SAMPLE JAMIE DIMON MEMO**

Dear colleagues,

As you know, I do not charge down paths I do not believe in. As such, I would like to let you know the current path I am traveling down, why I have started this journey, and why I would like you to consider joining me.

First, I have recently participated in a Leading Well-Being training. The session incorporated statistical evidence and suggestions for small changes to daily routines that result in long-term payoffs for the individual while yielding short-term payoffs for the workplace. For example, sitting for extended periods during the workday is now considered to be the new smoking, with negative impacts ranging from weight gain to poorer heart health. Personally, this training reinforced for me how some of the poor choices I make daily (e.g., choosing soda or sugary drinks over water) negatively impact how I feel.

Second, based on this training and encouragement from some of my colleagues, I have decided to start a personal journey to improve my overall health. Interestingly, I learned, or more appropriately re-learned, that overall health is multidimensional. It includes not only physical health, but significant contributions from your career, emotional health, social interactions, involvement in the community, and financial stability. That said, making dramatic changes to one or all of these aspects of health may provide short-term positives, but ultimately, if not implemented correctly, leads to long-term negatives. In other words, small sustainable changes lead to lasting benefits. Therefore, I will be implementing two small but impactful changes to my daily routine:

I will be making a conscious decision to stop consuming sugary beverages (e.g., soda) in favor of water.

I will choose healthier food options. That is, a reduction in the consumption of convenient fast-food options.

Lastly, I believe in 'a better me/you = a better us'. What I mean by this is that if we all take the time to focus on our individual health, we become a healthier group, which will lead, as studies show, to a happier, more productive group both in the workplace and at home.

Therefore, I leave you with the following question to ask yourself: If you could make two small changes today that could add quality to the years of your life, what would they be? Please join me in becoming 'a better us'.

**YOUR TURN**

Inspired by both of these, what might you write to your employees to encourage them to also engage with their well-being? How might you show vulnerability, much the way these two leaders did? How might you "get real" about what really matters?

How might you share about the personal well-being goal that you've set for yourself? How might you share about how much you value well-being, and the efforts you plan to make to create an Oasis of Well-Being within the team and across the organization?

**Jot notes below:**

**WRAP UP:**

By coupling role modeling with a willingness to talk about well-being, you have the power to engage employees with their well-being. This is especially the case if you, as a Trendsetter, are willing to show some vulnerability as Jamie Dimon did.





## CREATE: Brainstorm systems, activities and rituals.

We are now going to drill down into the team level. This activity is designed to help you brainstorm systems, rituals, activities and norms that can foster a culture of well-being within your team.

**Prompt 1:** First, open up your Tip Cards, reviewing ideas on how you can “Do, Speak and Create” – both for your team and for your organization.

**Prompt 2:** Building on ideas from Tip Cards, as well as what’s shown below, identify one thing you might do to promote well-being for your team – in each dimension.

Examples under each:

**Physical:** Walking/standing meetings, healthy food options at meetings, water jugs, reminders to stand up/take the stairs, team-based stretches and/or workouts

**Emotional:** Regular check ins, meeting starters (e.g., moment of silence, Name 3 Good Things, 5-3-1, moment of mindfulness), email-free Fridays, no meetings at lunch

**Social:** Team-based fun activities, office hours, systems to help team members get to know one another better

**Financial:** Peer-based discussion groups about finances (“Money Circles”), lunch n’ learns with financial experts

**Career:** Strengths self-assessments, job shadowing, cross-mentoring, ongoing professional development, passion projects

**Community:** Team-based volunteering, check ins about world events

**Jot notes below:**

### WRAP UP:

The purpose of this exercise is to help you generate systems & rituals that can be implemented within the team to create an Oasis of Well-Being.

## Your workshop guides.

### LAURA PUTNAM

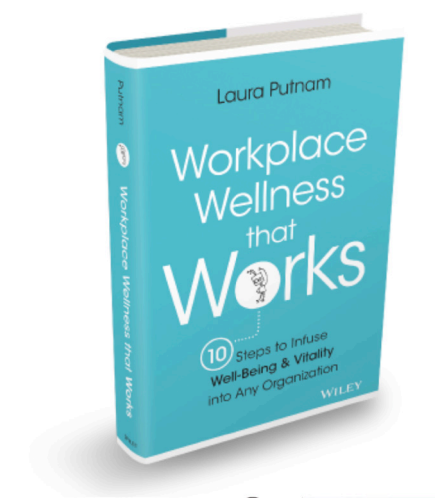
CEO and founder of Motion Infusion, international speaker, and author of *Workplace Wellness that Works*, Laura has worked with over 200 organizations and has trained over 20,000 managers and leaders. With a mission to get individuals, teams, and organizations “in motion” and on the path to better health and well-being, she has been featured on MSNBC, New York Times, ABC, FOX News, USAToday, Forbes, NPR and many others. She specializes in creating transformational learning experiences to spark lasting change. A graduate of Stanford and Brown Universities, Laura lives in San Francisco.

### WILL SOUTHERLAND

Manager of Construction, Will has worked in the oil and gas industry for 25 years and joined the Williams Companies in 2011. His experience has spanned major regulated cross-country pipelines, gathering and processing, and tactical projects. His BSBA in management has helped him understand the management of construction and people. He is passionate about improving construction and construction worker mental health. When not at work, Will enjoys spending time with his wife and children.

## Going to the source.

To read a fuller explanation of the content you’re learning, be sure to check out Laura’s book *Workplace Wellness that Works: 10 Steps to Infuse Well-Being & Vitality into Any Organization*.



## Ready to invigorate your company?

Interested in bringing this training directly to your organization? Great! This program can be delivered to your organization through a live training program or through a licensed product that your own learning and development team can bring to your employees.

### **About Motion Infusion.**

Motion Infusion is a global leader in well-being and engagement programs that actually work. Clients range from Fortune 500 companies to nonprofits, schools, and government entities. Services include keynotes, leadership and team development, and train-the-trainer programs. Additionally, we offer innovative and interactive curriculum products.

### **Contact:**

Laura Putnam, CEO  
laura@motioninfusion.com  
(415) 310-5505



Prepared for

